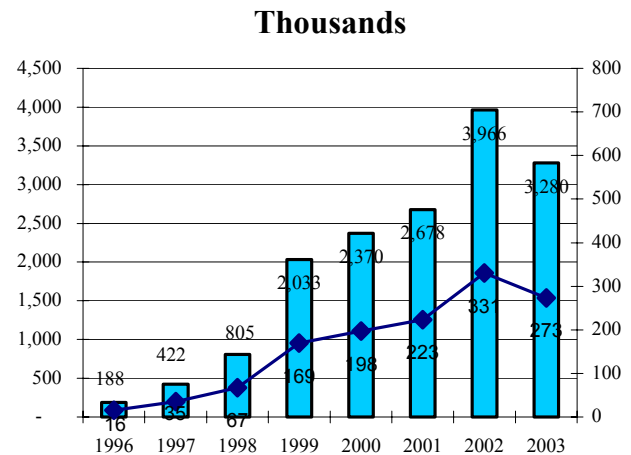


2004 Inquiry Analysis – Utah Tourism

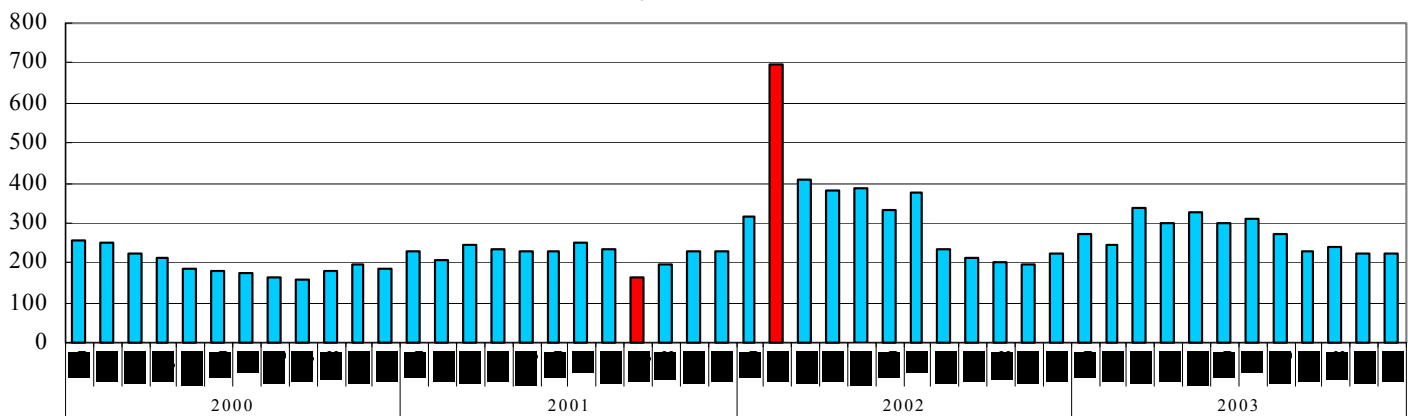
Internet

The Internet has rapidly become the premier tool for travel planning. More and more, consumers are turning to online sources to build and customize itineraries for their trips. This includes looking for deals, deciding which activities and events to pursue, and downloading maps and other transportation details. Utah has experienced a dramatic rise in the popularity of its consumer website, www.utah.com. Visits to the website have increased steadily through 2002. The Olympics had a dramatic effect on the amount of traffic on the website. Website visits during February 2002 totaled nearly 700 thousand. The number of visits in 2003 was lower than in 2002, but still much higher than in 2001. This seems to indicate that the popularity of the Internet for travel planning continues to grow.

Utah.com Internet Inquiries



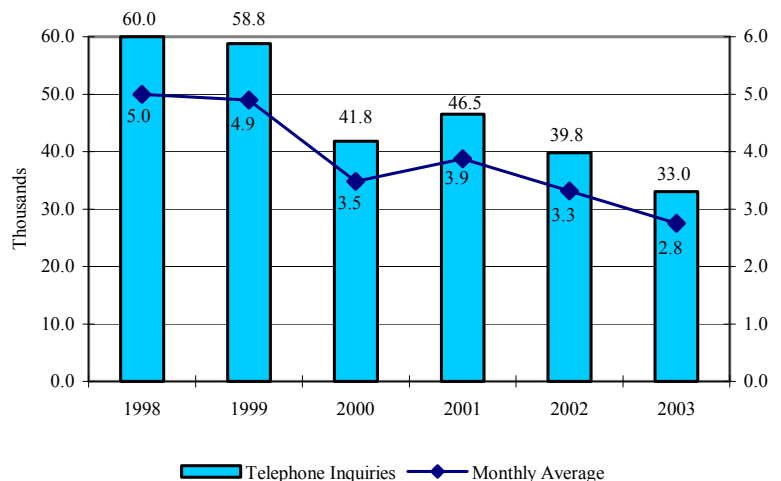
Monthly Visits to Utah.com



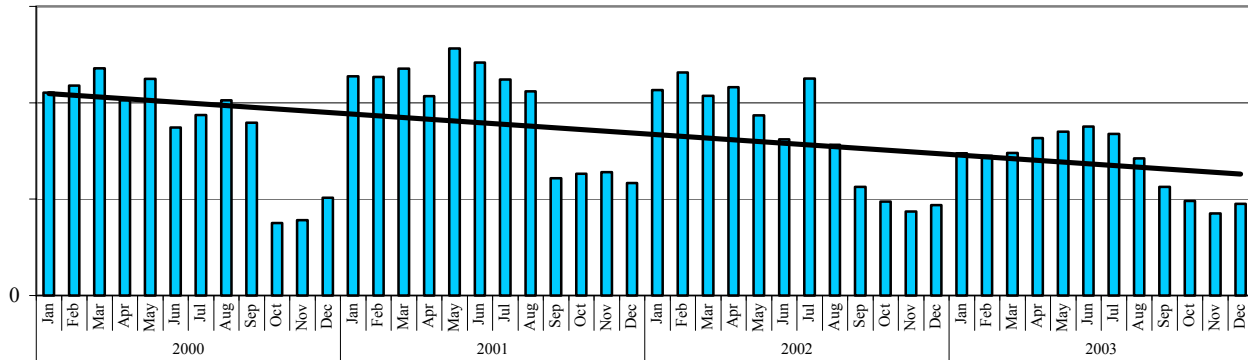
Telephone Inquiries

From 1996 to 1999, the Division included the toll free telephone number and utah.com website address in all advertising. During the 2000 campaign, the Division experimented with publishing only the website address. The number of phone inquiries reflects the decision – call volume declined significantly during 2000. In response to many visitors who requested quick access to a telephone number, the toll free telephone number was added to the home page banner. In recent years, the toll free number has been found in some print ads but not in others, and it has not appeared in television ads. In 2001, the call volume increased, but has steadily declined since then. The increased popularity of the Internet combined with the sporadic use of the toll free telephone number in the Division's advertising may account for the decline over the last few years. Now, nearly 3,000 inquiries are received per month.

UTC Telephone Inquiries



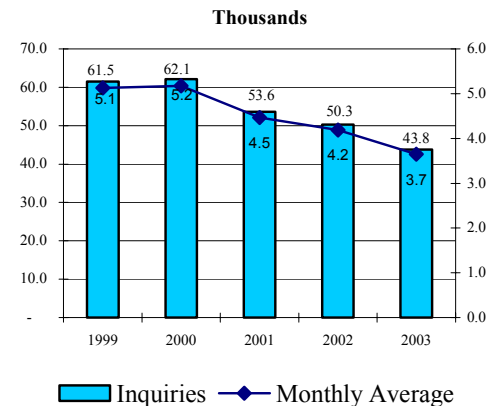
UTC Call Center Activity



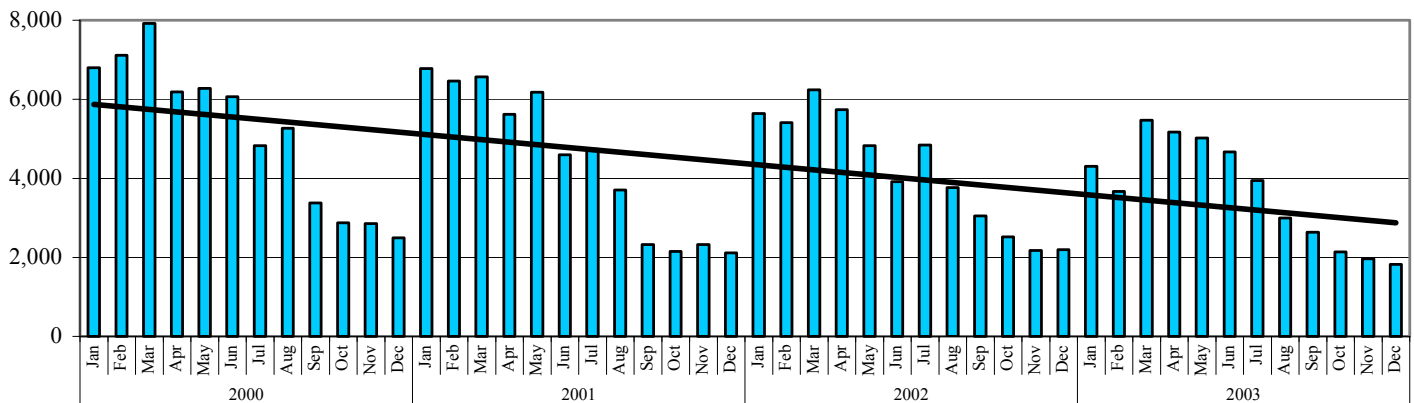
Travel Guide Distribution

Travel guide distribution has been declining steadily the last few years. In the late 1990's and in the year 2000, travel guide fulfillment hovered around 60,000 per year. Nevertheless, the average number of travel guides distributed each month has lowered from around 5,000 to 3,700 over the last five years. A variety of factors have contributed to the decline. The weak economy, combined with 9/11, SARS, terrorism, and the war in Iraq contributed to people traveling less. Perhaps a larger factor is the Internet. People can go online to get the same information found in the travel guide. Additionally, the Internet has enabled people to make their travel plans at the last minute, which eliminates the need to order a travel guide weeks in advance.

UTC Travel Guide Fulfillment



UTC Travel Guide Fulfillment



2003 Travel Guide Fulfillment

During 2003, 43,800 requests for Utah Travel Guides were recorded, roughly 13% fewer Travel Guides than were distributed during 2002. The ratio of international requests compared to total requests declined about 1% compared to 2002 – approximately 8% of total requests. Fulfillment requests were received from all fifty states, the District of Columbia, several U.S. Territories, and 70 different countries worldwide.

Domestic Requests. Total domestic travel guide requests totaled 40,496 in 2003. The distribution of requests generally paralleled state population, with the more populated states accounting for the majority of all requests. Texas, California, Florida, Illinois, and New York each accounted for 4.0% or more (1,700+) of all domestic requests.

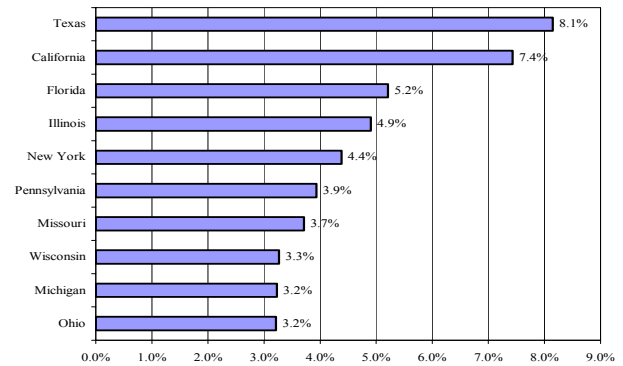
Because population differences make state comparisons difficult, a per capita measure of information requests is useful to examine Utah's relative performance in various states. As expected, several western states appear at or near the top of the list -- Utah, Wyoming, and Montana.

Several Midwest states, including Missouri, Kansas, Wisconsin, South Dakota, Nebraska, Minnesota, and Iowa also appeared in the top ten, suggesting a possible regional advantage among travelers from that area. The average number of requests per million people among all fifty states was 137.

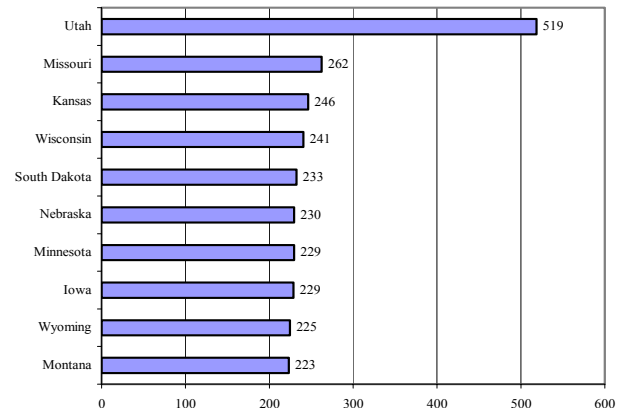
Sources of Travel Guide Requests. The sources of inquiries during 2003 reflect the continued growth of the Internet in travel planning. Travel guide requests received via the Internet and road atlases were the primary sources of information requests received throughout the year. Although these two sources represent approximately 84% of the overall total, other sources of inquiry continued to attract attention. Traditional inquiry resources such as magazines, toll free telephone numbers and newspapers also contributed to making Utah information available to the greatest number of consumers. Additionally, nearly 2% of those who requested information found out about Utah from their friends.

International Requests. International travel guide requests totaled 3,304 during 2003 and were received from 70 countries. The majority of requests originated from Canada and Western Europe. Canadian requests comprised 52% of total international inquiries. The Western European countries of the United Kingdom, Germany, Netherlands, Italy, and France comprised another 30%. The widespread international distribution of the Utah Travel Guide and the number of requests from developing countries in Eastern Europe, Asia and South America reflects the ease with which information can be exchanged in the modern economy and the increasing interest in international travel. For example, Brazil, India, Mexico, Romania, Philippines, Taiwan, Czech Republic, and Poland all ranked in the top twenty-five as countries most frequently requesting Utah information.

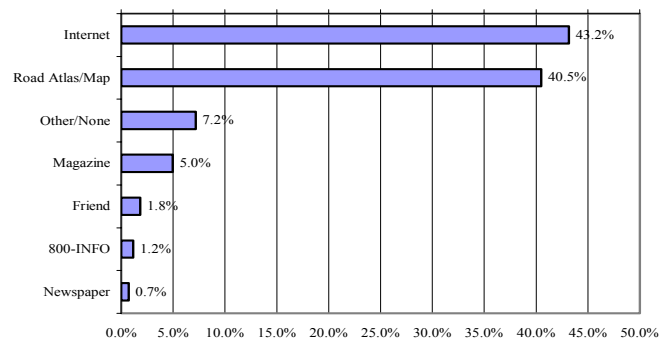
Total Requests by State
(% of total U.S. Requests)



Total Requests by State
(per million population)



Major Sources of Travel Guide Requests



Total Requests by State

